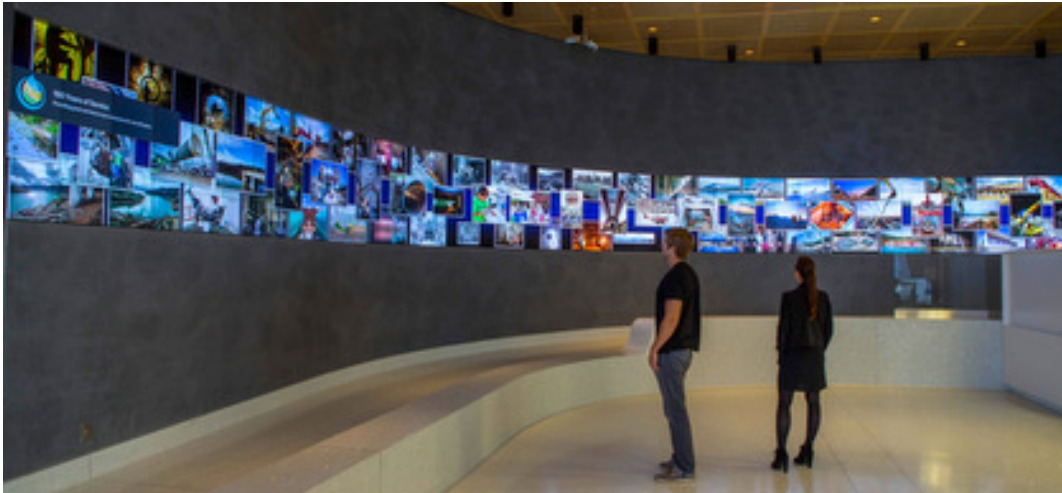


Global Video Wall Market Posts 25% YoY Growth

Written by Roger Douglas
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The videowall market grew nearly 60% CAGR from 2009 to 2013 to reach sales of 449,000 units, according to **Futuresource Consulting**.

The market has settled into a period of relative stability with super narrow bezel (SNB) display now a firmly established technology and rear projection cubes (RPC) largely retrenching into specialist, high end applications. However, this paradigm is set to be challenged with the introduction of **narrow pixel pitch (NPP) LED** which Futuresource expects to be a significant disruptive technology in the coming years.

Whilst the Futuresource report paid particular attention to the interplay between adoption of different technologies, each product category has a unique set of features which tends to dictate the end usage model and vertical environment.

"The RPC category has been hugely resilient over the past five years when the industry perhaps expected to see sales fall away, being replaced by SNB products," says Chris McIntyre-Brown of Futuresource Consulting. "The reality has been an environment where both technologies can coexist. As an example, the utilities and process control applications - the heartland of RPC - has seen a strong uptake of SNB while RPC sales also maintain steady growth. The introduction of solid state engines has clearly been a boost for the category, overcoming UHP limitations and, for a short period, dramatically shortening replacement cycles. The market is nearing the end of its transition to LED and, with the exception of laser solutions which are unlikely to impact in the near term, we expect to see the category enter into slow

decline."

After the explosive growth witnessed between 2009 and 2012 - well in excess of 100% - the SNB market slowed in 2013 to less than 30% YoY growth, accounting for over 90% of sales. R&D dollars have been focused on the reduction of bezel/mullion widths rather than screen size ranging or higher resolutions. This has driven the introduction of ultra narrow bezel products with just 3.5mm bezel to bezel. This focus may alter in 2014 however as a host of 84-inch 4k panel solutions enter the market, with prices expected to tumble rapidly as panel providers seek to stimulate demand for 4k panel. In turn this is expected to pressurise 46-inch SNB solutions as end users may find the additional costs of installing and maintaining a 2x2 SNB solution unpalatable against an 84-inch 4k panel.

The SNB market has gradually evolved into three distinct tiers, ranging from mass volume players through to absolute specialist. It has been interesting to note traditional RPC vendors continuing to build SNB sales, trading on a long heritage in tiling display technology, whilst maintaining performance in the RPC category.

"Though 2013 was its first full year of sales, NPP LED (less than 3mm) enjoyed a strong year," says McIntyre-Brown. "To put the performance into context, and as a very crude measurement, NPP LED accounted for nearly 4% of all videowall square metres sold in 2013. This technology brings an essentially outdoor technology into indoor environments to compete directly with the RPC/SNB categories and, despite being in its infancy, key competitive and market indicators suggest this nascent technology will become an important technology in the future."

From a vertical perspective the battle between technologies is focused on the control room application which represented 19% share of the videowall market in 2013. Sub verticals drawing from video feeds, for example surveillance and traffic management, have seen relatively fast adoption of SNB products. However, verticals using industry control systems (ICS) have tended to continue using RPC.

Away from control rooms, public display and retail have been strong performers with over 40% and 15% share respectively in 2013. Digital signage has been a clear catalyst for this strength with large display opportunities attractive to network owners.

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Geographically, emerging markets still offer excellent prospects across both product categories with China absolutely dominant. RPC demand in developed markets is soft and expected to decline moving forward. The trend toward 'everything smart' may have a positive impact but unlikely to impact RPC growth significantly. The picture for SNB is very different with developed markets performing equally as well, often due to more developed digital signage sectors.

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